Well Visit: Prior Well Visits

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> ⚠️ OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.
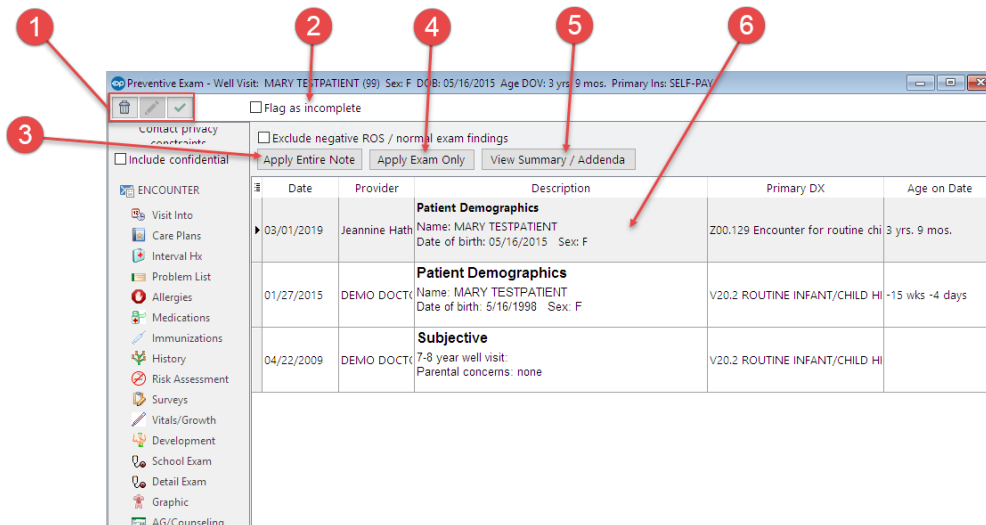
Version 14.19

> 🎯 This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Well Visit: Prior Well Visits

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Well Visits > New or Open Note button > Prior Notes button in various Well Visit windows**

The Prior Well Visits window lists the previous Well Visit Notes. Selected notes from the list can be viewed and applied to the current Well Visit Note.

Well Visit: Prior Well Visits Map

Number	Section	Description
1	Well Visit Function buttons	The Function buttons delete an entire Well Visit Note, edit a Well Visit Note, or save a Well Visit Note.
2	Flag as Incomplete checkbox	The Flag as Incomplete checkbox marks the Well Visit Note as unfinished.
3	Apply Entire Note	The **Apply Entire Note** button applies the highlighted Well Visit Note to the current note. The operation overwrites all data in all fields.
4	Apply Exam Only button	The **Apply Exam Only** button applies the exam from the highlighted notes to the current exam. The operation overwrites the School Exam and Detailed Exam sections.

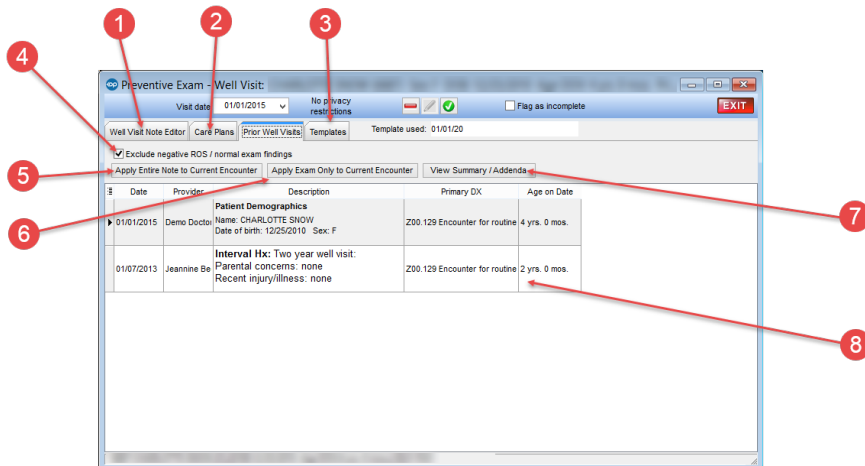| 5	View Summary/Addenda button	The **View Summary/Addenda** button opens the **Encounter Summary Sheet** for a previous Well Visit Note. You can review the notes from a previous exam, create an addendum, or co-sign a highlighted record using this operation.
6	Prior Well Visits grid	The Prior Well Visits grid displays the previous Well Visit Notes and messages based upon the date range and privacy level selected. Double-click a Well Visit Note in the Prior Notes list to open the **Encounter Summary Sheet** for that note.

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About Preventive Exam: Prior Well Visits Tab

> **Path: Smart Toolbar > Chart button > Well Visits tab > Open Note button > Prior Well Visits tab**
>
> **Path: Smart Toolbar > Schedule Button > Well Visit tab > Edit button > Prior Well Visits tab**

The Preventive Exam window charts a patient well-visit exam. The Preventive Exam window helps to code and complete a preventive encounter visit. The preventive exam note encompasses both narrative and comprehensive formats. It also allows you to customize the layout of the note. The note is added to the patient chart.

The Prior Well Visits tab lists the previous well visit notes. Selected notes from the list can be viewed and applied to the current preventive exam.

Preventive Exam: Prior Well Visits Map

Number	Section	Description
1	Well Visit Note Editor tab	The Well Visit Note Editor documents the patient preventive exam. The Well Visit Note Editor contains the following tabs: • **Visit Info** • **Interval Hx** • **Problem List** • **Allergy/Rxn** • **Med Review** • **Immunizations** • **History** • **Risk Assess** • **Surveys** • **Vital Signs** • **Development**

- **Detailed Exam**
- **School Exam**
- **Graphic**
- **AG/Counseling**
- **Diag Tests**
- **Assess/Plan**
- **Coding**
- **Summary**

2	Care Plans tab	The **Care Plans** tab lists, prints, and manages care plans for a patient's health maintenance schedule.
3	Templates tab	The **Templates** tab lists the templates that are created, edited, and reviewed in the **Well Visit Template Editor**. Templates are pre-written scenarios you can use in a well visit to document common pediatric diagnoses. Templates include detailed descriptions for the usual pertinent positive and negative findings of a wide variety of illnesses, with a standard assessment, plan and ICD-10 coding. Included with your installation of Office Practicum are Pediatric specific templates.
4	Exclude negative ROS/Normal Exam Findings checkbox	The Exclude Negative ROS/Normal Exam Findings checkbox is used to not apply social, family, and medical hx in CodeSuggest.
5	Apply Entire Note to Current Encounter button	The Apply Entire Note to Current Encounter button applies the highlighted well visit note to the current note. The operation will overwrite all data in all fields.
6	Apply Exam Only to Current Encounter button	The Apply Exam Only to Current Encounter button applies the exam from the highlighted notes to the current exam. The operation will overwrite the School Exam and Detailed Exam sections.
7	View Summary/Addenda button	The View/Edit Note & Addenda button opens the **Encounter Summary Sheet** for a previous well visit note. You can review the notes from a previous exam, create an addenda, or co-sign a highlighted record using this operation.
8	Prior Well Visits grid	The Prior Well Visits grid displays the previous encounter notes and messages based upon the date range and privacy level selected. Double-click an encounter note in the Prior Notes list to open the **Encounter Summary Sheet** for that encounter note.